

Next Generation Communication

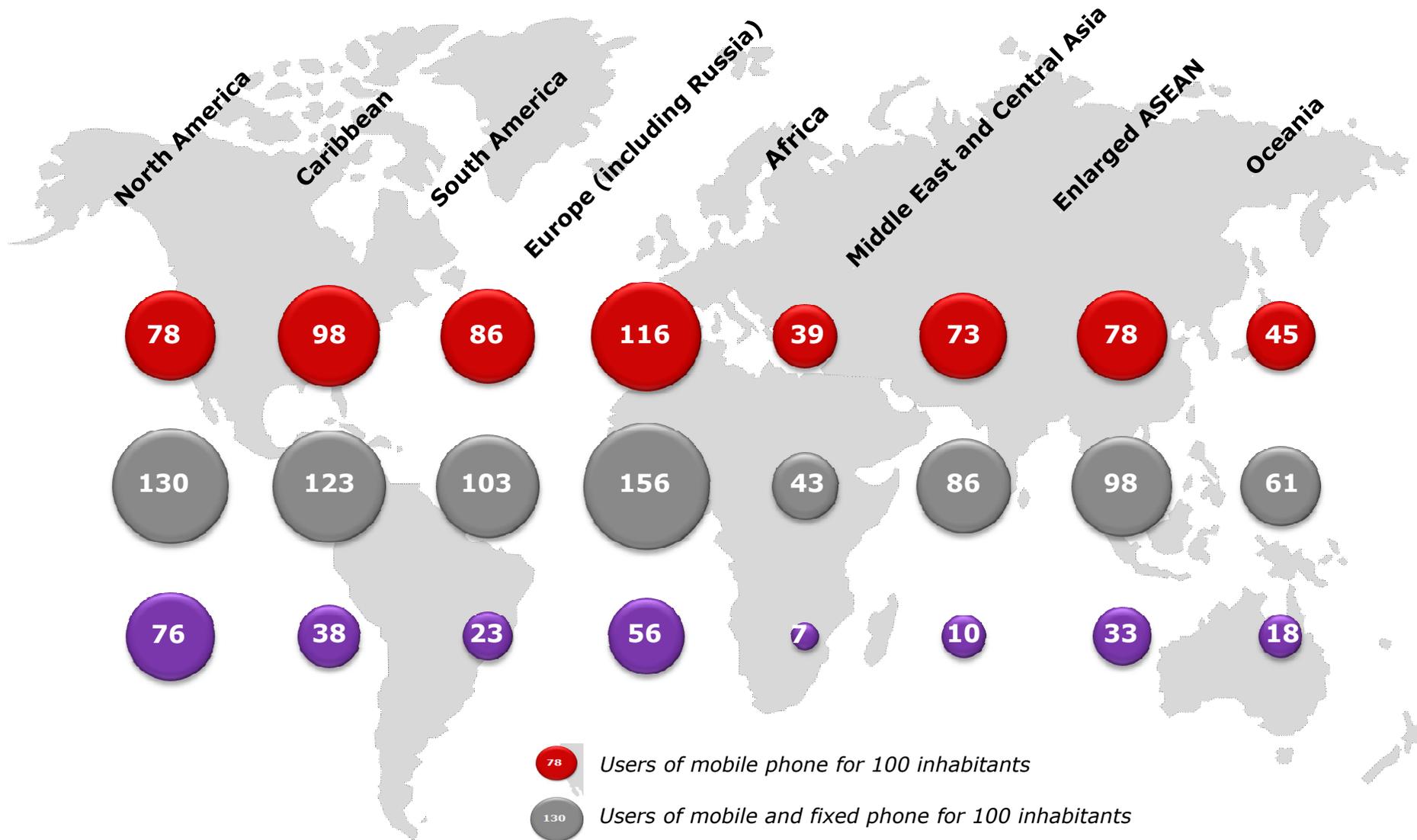
Challenges for the Digital Society

“... And what if the Telcos did not exist?”

Henri TCHENG, Partner BearingPoint Paris

Tuesday, June 15

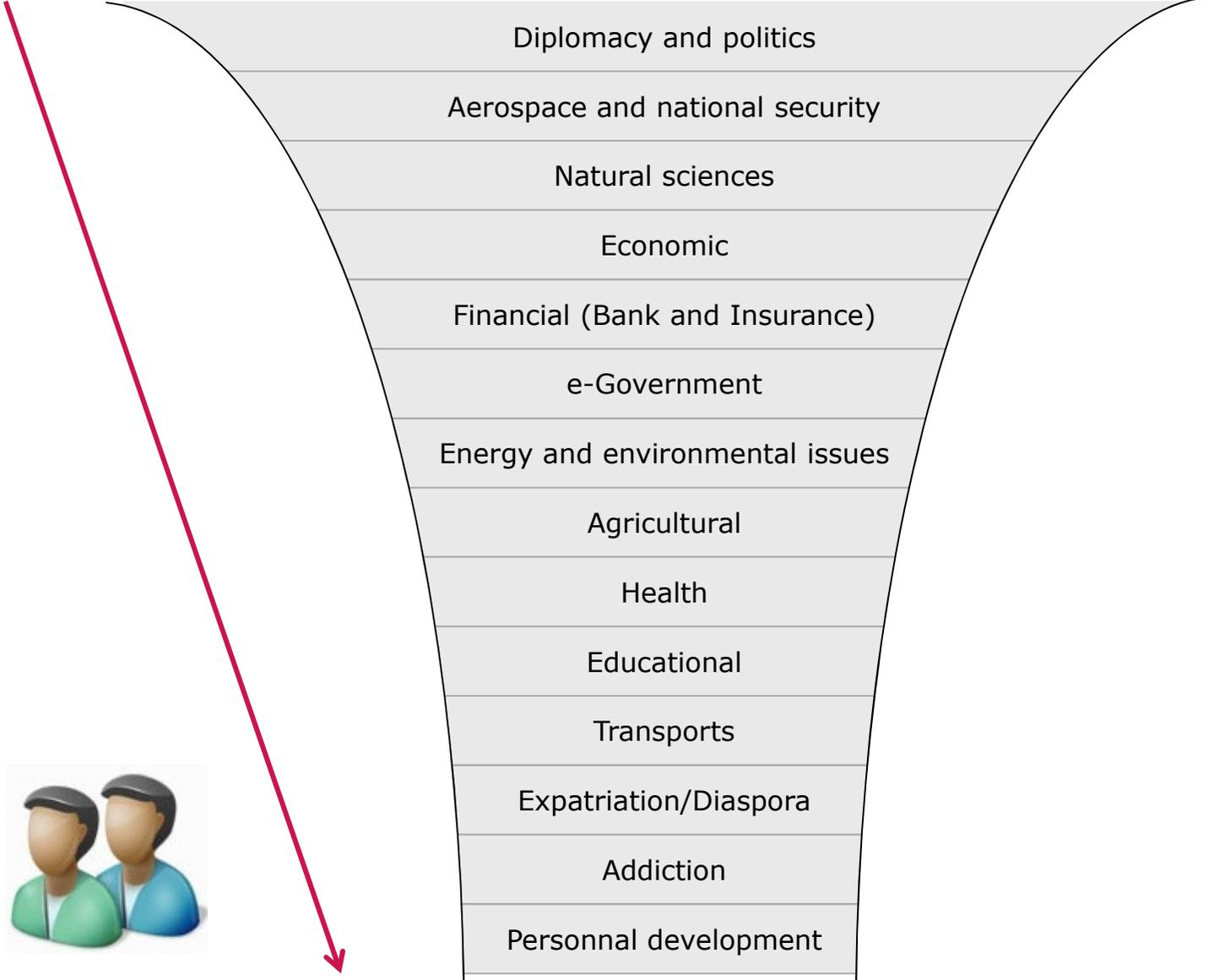
Societal impacts and differences between North and South: what are the effects of new media?



-  Users of mobile phone for 100 inhabitants
-  Users of mobile and fixed phone for 100 inhabitants
-  Users of Internet for 100 inhabitants

Source: World Bank

From a diplomatic level to an anthropological one, new media engenders a global revolution



Since the Moscow-Washington hotline, new media has acquired a major role in international and internal policies

Diplomacy
and politics

BearingPoint.

Key points

Offered by new technologies, immediate ability to react is a key success factor for world leaders

The 19th article of The Universal Declaration of Human Rights is completely applicable to Internet...

...but an international and juridical frame is needed to prevent possible drifts

Illustration



Key figure

12

Countries declared "enemy of Internet" according to Reporters Without Borders in 2009

Contributions of new media for aerospace industry and national security are two-tier

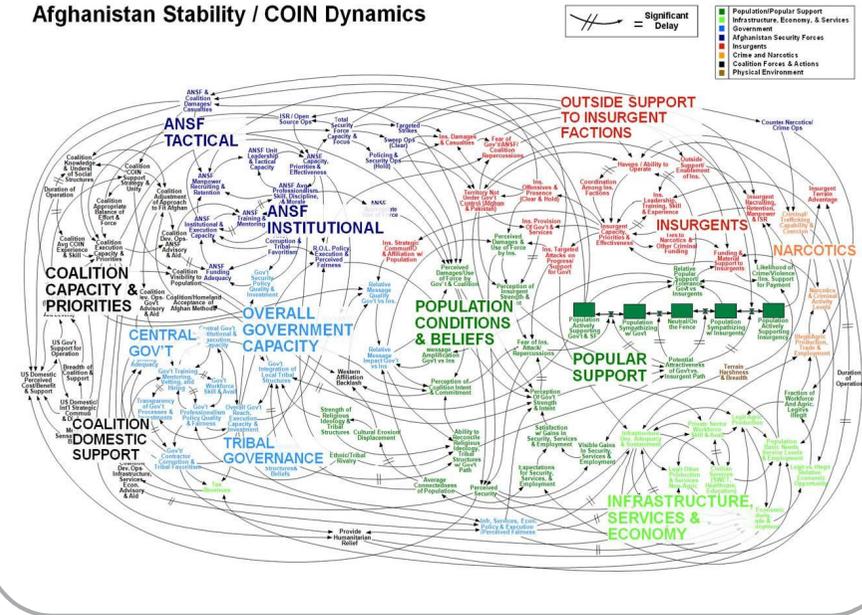
Key points

Telcos and new media is an opportunity for national and international security...

...but can also become a threat

Illustration

Afghanistan Stability / COIN Dynamics



Key figure

€ 3.4 billion

is the initial cost of the Galileo Programm

Telcos have allowed huge progress in research and natural sciences development

Natural sciences

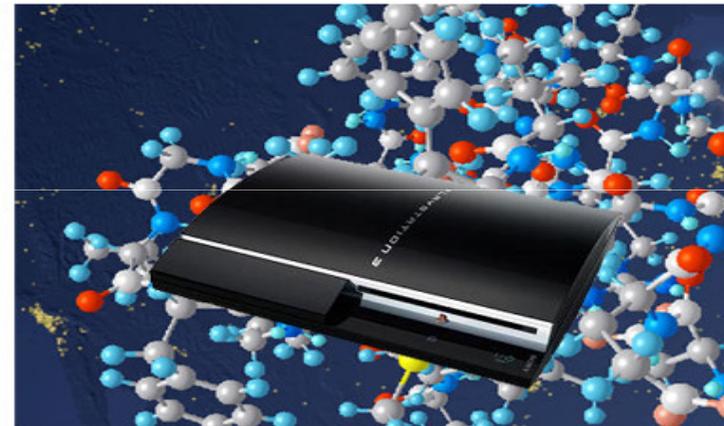


Key points

Grid computing allows faster development and researches in the natural sciences field

Illustration

Folding@home distributed computing



Key figure

6,2 PFLOPS

Is the performance of Folding@home in April 2010, a million times more powerful than a PlayStation 2

Directly and indirectly, Telcos are the release mechanism for new economic opportunities

Economic



Key points

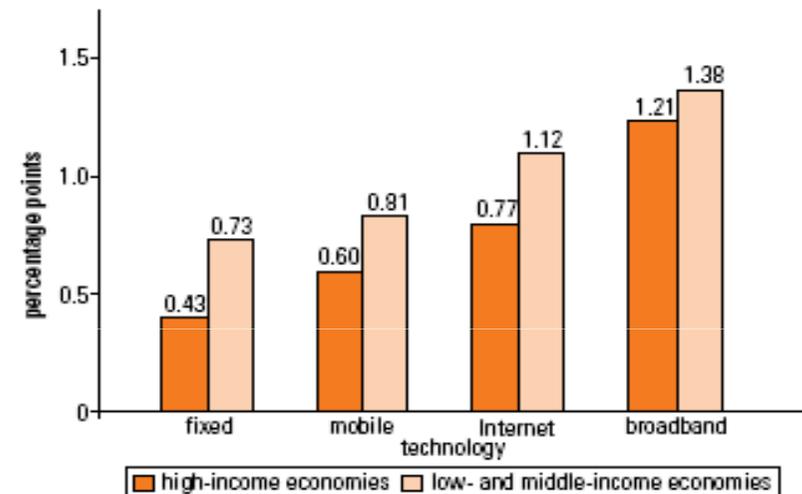
In developing countries, Telcos have a clearly identified impact on economic growth and employment

Each technological innovation creates new market segment...

...and destroy others

Illustration

Correlation between telcos penetration rate and economic growth



Growth rate for 10% rise of mobile phone penetration rate

Key figure

1,2 million

possible job losses in 2015 in creative industry in Europe if nothing is done in the legal field

Mobile payment and money transfers, new media speeds up traditional channels

Financial
(Bank and
Insurance)



Key points

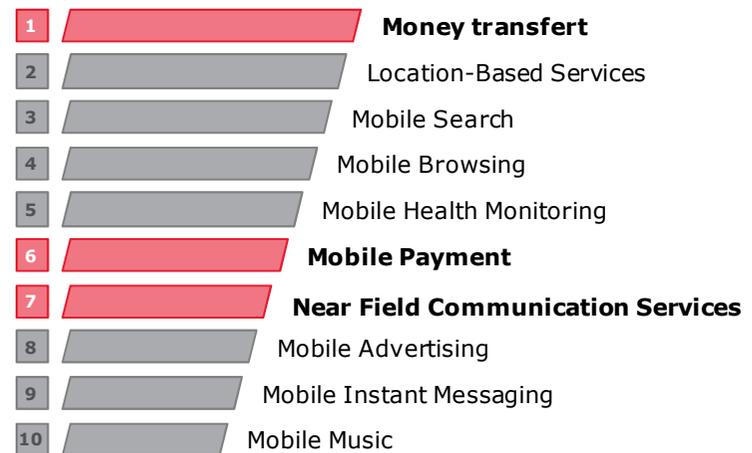
Money transfer through mobile phones is a fast growing business in developing countries

M-payment creates large expectations in developed countries

Insurance fully benefits from new media innovations

Illustration

Top ten of the most used mobile application in 2012



Source : Gartner

Key figure

28%

of money transfer in Kenya are done thanks to m-transfer (M-PESA service)

Telcos are facilitating interaction between Administration and Citizens, even if some innovations backfired

E-government



Key points

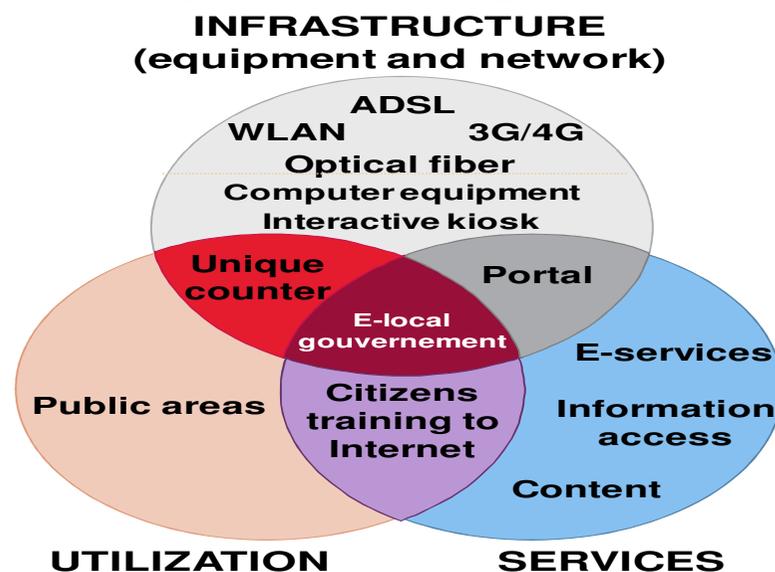
In developing countries and where transport network is not developed or in a good shape, reach a administrative service is one of the first reason for call

In developed countries, new media acquires recently a double logic: top-down and bottom-up

But some subjects are presently too sensitive or technologies have still progress to make

Illustration

The three dimensions of Telcos development in local government



Key figure

1 hour

It's the time for a Cape Verdean to create a company thanks to the unique counter of the administration (63 days before)

New media can lead to radical progress in the energetic and environmental field

Energy and environmental issues



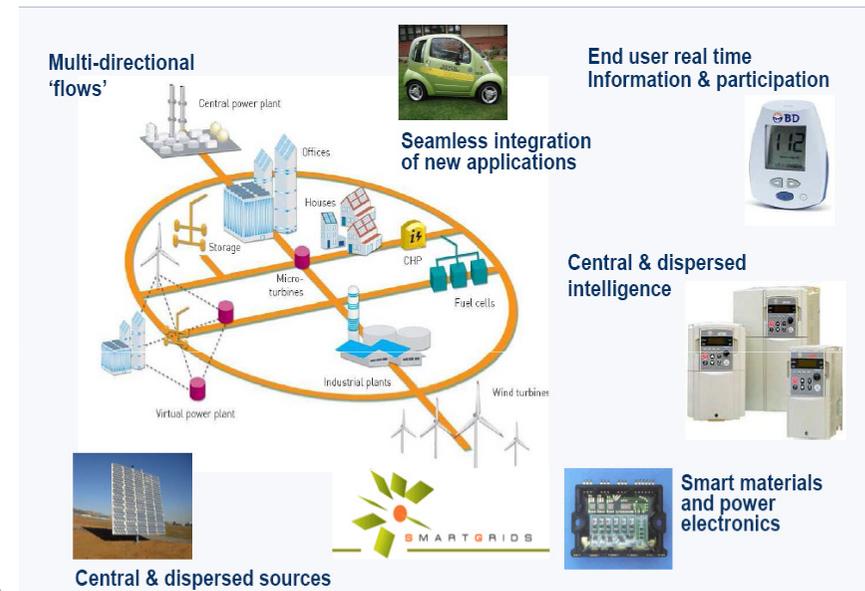
Key points

Production and distribution of electricity are going through a revolution due to new telcos technologies

Green IT is a new economic El Dorado

Illustration

SmartGrids Vision



Key figure

60% / year

is the expected growth rate of the Green IT market until 2013

For farming sector and farmers, new media created a revolution



Key points

Agricultural sector benefits from an higher productivity thanks to new generation technologies

New media brings disintermediation in the agricultural business

Illustration

Non-exhaustive list of SMS Sokoni services by Safaricom in Kenya

SMS SOKONI			Content to include commodity prices from markets across the country
News Channel	Activate:	Deactivate:	
Commodities	Maize Prices ON/OFF		
	Potatoes Prices ON/OFF		
	Tomatoes Prices ON/OFF		
	Cabbages Prices ON/OFF		
Transactions:	Beans Prices ON/OFF		
	Selling ON/OFF		Subs who would like to buy produce may activate this channel to get updates on the price offers across the country
	Buying ON/OFF		Subs who would like to sell produce may activate this channel to get updates on bids across the country

Key figure

3 millions

cattle in Botswana were equipped with RFID chip to provide a global follow-up of the production and export according to EU rules

At different levels according to countries, new media has an important impact on the health sector

Health



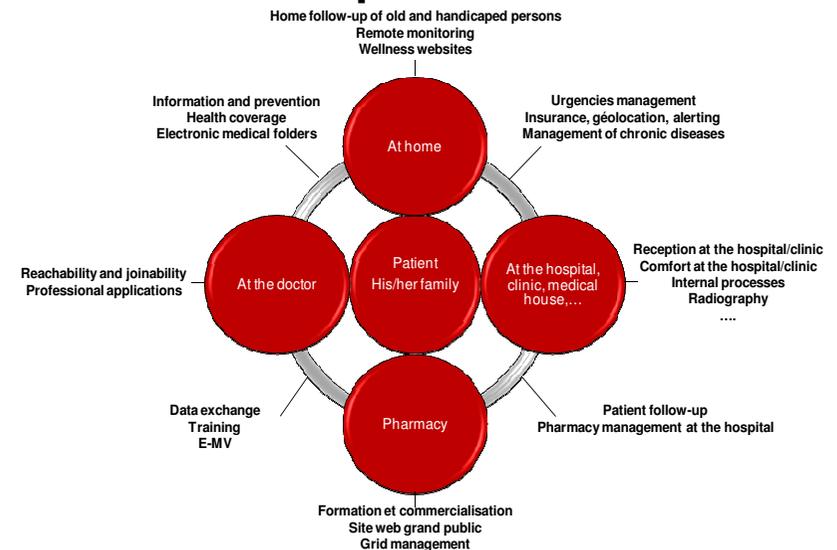
Key points

Health sector is largely improved by the development of new technologies in developing countries

Each step of the value chain is impacted by new technologies in developed countries

Illustration

Telcos and health in geographical spaces



Key figure

€ 1.6 billion

is the total estimated expenditures for clinic software in France in 2013

Giving an access to knowledge or modernizing traditional channels, educational stakes of new media are major

Education

BearingPoint.

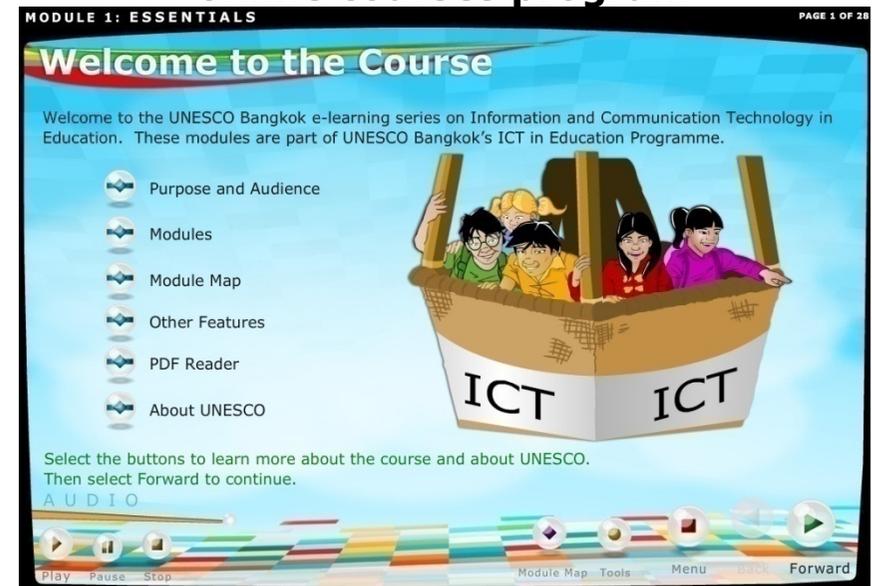
Key points

In developing countries, different communicational means are used according to the message and the target market

Information and communication technologies in education can match youth interest with educational needs

Illustration

UNESCO has developed a free and online courses program



Key figure

39 countries

in Africa have developed since 2007 educational programs including ICT

Transport and logistic industry benefit fully from technical progress of Telcos

Transport



Key points

In the transport field, new media lead to a global improvement of the whole value chain

At an individual level, modernization of transport industry benefits to the consumer

Illustration



Key figure

US\$ 3 billion

Annual savings of airlines industry thanks to 100% e-ticketing

One of the first objectives of new media is to move people closer

Expatriation/
Diaspora



Key points

New media offer more possibilities of expatriation

New media have a positive impact in case of civil wars or natural disasters

Illustration

Eruptions of Eyjafjallajökull in 2010, Iceland



Key figure

\$ 5.9 billion

is the videoconferencing revenue expected in 2010

Developing countries can still avoid drifts of developed countries

Addiction



Key points

New media create a dependence and lead sometimes to “drug rehabilitation”

Illustration



Key figure

6% to 10%

of the online population is dependent upon one or more aspects of cyber technology and the Internet

At a very small scale, new media imply new social and individual rules

Personal
development



Key points

Developed countries are experiencing the web 2.0 revolution

New communicational tools, new habits

Illustration



Key figure

400 millions

is the amount of members exceeded by Facebook in February 2010

Progress of Telcos in developed and developing countries: two starting points for the same result?



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& Technology
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